July 2010 Newsletter

Dear Client

We have now finished testing our latest setups which will allow Acumen to run PC and Server versions up to an including Windows 7 and Windows Server 2008 R2 respectively.

These are available on our website for anyone wishing to move to Microsoft's new operating system. If you are considering moving, please give us a week or so notice.

Power of Attorney

We had several of you reply to our request in the last news letter about the Power of Attorney's moving from the Statutory Registers to the Database Tab. Since all of those replies were in favour of this we will be moving the screen in due course.

Help

The Help system has been updated to include several amendments and corrections, in particular changes to the contacts screen.

For Comment

On the main contact screen there is a field for Bank Sort Code, we believe that this is no longer used; if anyone is using this can they let us know otherwise this will be removed. Any existing data will be appended to the contacts comments

One other item we are looking to change is the storing of the passport number, from the main contact screen to the comments of the relevant diligence line. We would migrate all data where possible, again any data that cannot be assigned to a line in diligence would be appended to the contacts comments field. Please advise if you are against this change.

Changes

- We have recently added (and are still developing) a QROPS module. For further information please contact us.

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- We have now split the tab “Diligence/Other Parties”. This was to enable sites to have more space for the diligence tab. As part of the split we have added some new checkboxes for you to tag contacts. These options are searchable using the Search Contacts functionality.

- We have added the ability to list transactions in the TB enquiry screen either Latest to Earliest or Earliest to Latest (Default). This is a global system setting and will only affect the display. Let us know if you want your system changed.

- We have also added the ability to approve WIP input. This works by assigning employees to a department and then assigning departments to managers. This enables manager to approve time before its available to bill. Please budget £1250 to have this additional functionality added to your Acumen.

Report Layouts

We are looking to standardise all our reports as there is currently inconsistence’s. Fonts will be updated to:

- Headers/Titles – Arial Pitch 12
- Detail – Arial Pitch 10 (or 9 for reports with limited space)

Some reports have the entity name and other don’t when running reports for entities. This had led to comments that it is not always easy to identify reports for one entity on a busy printer. Now all entity specific reports will have the entity name on the report.

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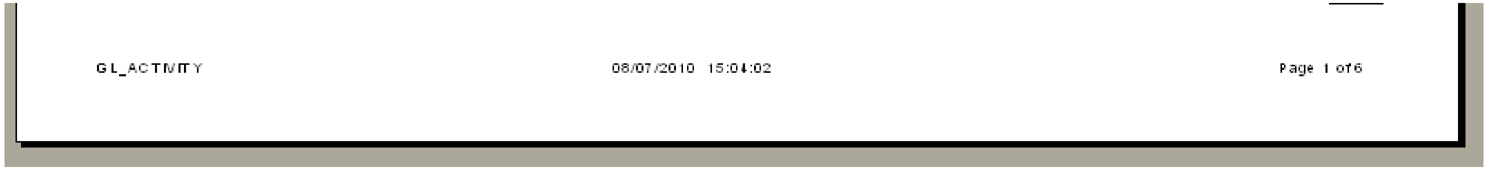
Also on the footer we currently include the name of the report (left), the time (centralised) and the page number (Right).

Current Footer



Going forward this will be as follows:

New Footer

Alternate New Footer. Including "Requested By".

The "Requested By" will be a system setting, so you can either have it on for relevant reports or not.